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ABSTRACT

This paper provides summary information on each district policy and an objective comparative analysis between districts regarding transfers requested and transfers granted in relation to school size. Findings indicate that the smallest districts have no written transfer policies, the next largest have rigidly defined policies, and the largest have policies allowing considerable administrative latitude. Some factors influencing the frequency of transfer requests are the degree of clarity of district attendance boundary lines, the placement of attendance boundary lines, the degree of differentiation between schools in specific school districts, the degree of differentiation within schools in specific school districts, the amount of information available about individual schools, and the composition of each district's population. (DN)

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A COMPARATIVE ANALYSIS OF STUDENT TRANSFER POLICIES FOR MAJOR METROPOLITAN SCHOOL DISTRICTS IN OREGON

WORKING PAPER 2

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Purpose

This working paper is an attempt to put into perspective the various policies, formal and informal, of major metropolitan school districts[1] in Oregon. In this paper, we explore the range of policies, the frequency of transfer requests, and the frequency of granted transfer requests that exist in the abovementioned districts. We also suggest some of the variables which may be involved in the frequency of requested transfers and the reasons for those requests.

The authors of this working paper are currently conducting an in-depth study of some of the variables involved in the requesting of intra-district school transfers in Eugene School District 4J.[2]

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[1]"Major metropolitan school district" is defined as those districts serving a single urban or contiguous suburban area and administering more than one high school. In Oregon, eleven districts fit these criteria.

[2]The study is being conducted with the assistance of a grant from the Office of Scientific and Scholarly Research, the research arm of the Graduate School of the University of Oregon.

Methods

This paper is a comparison of student transfer and attendance policies for selected Oregon School Districts. The first task was to ascertain what the policies were which we wished to compare. The '71-'72 Directory of Oregon Schools and Community Colleges was consulted to learn which districts fir our criteria. Each district was then contacted by phone. A Xerox copy of each district's official student transfer and attendance area policy was requested. In addition, estimates of the number of transfer requests and the number of requests granted for the present school year were asked for. Finally, through verbal questioning, a statement of the current administra... attitude toward student transfers was solicited.

Most of the statistical information in this paper is drawn from the letters and copies of policies which we received. Other statistical data (the number of schools, size of student population) is drawn from the 1971-72 Directory of Oregon Schools and Community Colleges. Information from the Directory and telephone conversations will be footnoted.

No conclusions are drawn in this paper as to the effectiveness, adequacy, or desirability of particular policies. Our task is that of objective comparative analysis.

Summary of Data

The range of policies and administrative attitudes encountered in the districts studied reflect the differing points of view and conditions of each district. Official, written transfer policies range from nonexistent policies to those carefully specifying each acceptable reason for transferring. Administrator's attitudes concerning intra-district transfers range from what might be termed "supportive" to "discouraging."

Three of the eleven districts, the Albany, Corvallis and Klamath Falls districts, have no officially adopted, written policy. These are among the smaller districts. The policies under which these districts operate are informally understood, administrative policies.

Formally adopted, written policies are found in the remaining eight districts. These written policies may be separated into three categories: 1) the Lake Oswego, North Clackamas, Springfield, Salem, and Gresham districts have policies which explicitly state most or all of the acceptable reasons for transferring, leaving little room for administrative discretion. 2) The Eugene and Beaverton districts have adopted policies which give administrators considerable latitude in determining whether or not a transfer should be granted. 3) The Portland Public Schools' policy establishes three types of transfers, one of which involves the active recruiting of students for transfers. A single consideration, that of racial balance, makes the Portland district's policy unlike those of other districts. In practice, the Portland district's policy allows easy transfers for Blacks (to all but a few, majority-Black schools) while making transfers for Anglos quite difficult.

In evaluating the total nature of a district's transfer policy, administrative attitudes toward transfers can be a factor equally or more important than a district's written policy. Salem Public Schools administrators, for instance, have an attitude toward transfers which overlooks the specifics of the district's written policy: in the words of Salem Public Schools Superintendent Charles Schmidt, they are granting transfers "quite freely now," in spite of a relatively restrictive written policy. Likewise, in Lake Oswego, a positive attitude toward transfers may contribute to a higher rate of transfers than in similar districts. In districts other than those just mentioned, administrative attitudes tend to follow the written policy of their distri- These districts with flexible written transfer policies tend to have flexible attitudes; those with more rigid policies tend to have rigid attitudes.

A third factor which may affect transfers is the administrative level at which transfer decisions are made. The Gresham, Beaverton and Corvallis districts rely to a great extent on principals of the two schools involved either to make the final decision, or to forward recommendations to a district administrator. The Springfield district depends upon a committee to evaluate transfer requests. In the remaining districts, a district level administrator generally determines the outcome of requests.

There does appear to be a relationship between the size of the student population and way in which transfer policies are administered. For instance, it is only in the smaller districts (3,000 to 7,000) that no written policies are found. Of those districts having a policy allowing considerable administrative latitude, all have student populations of between 18,000 and 22,000.[3]

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[3] Salem is considered in this category because in practice, its policy allows considerable latitude.

Remaining districts, those with more strictly defined policies either fall between these two clusters, or are special cases: the Portland Public Schools must consider racial balance; the Gresham district administers only high schools.

An area that appears to warrant further study is how stated policies and attitudes affect the number of transfer requests. Our data suggest there may be a relationship between strictness of policy and the number of requests. For instance, Albany, Klamath Falls and North Clackamas have fewer requests per pupil than the other districts for which figures are available. In each case, stated policy or attitude or both is not favorable toward transfers.

Springfield, the district having the highest number of requests per pupil may not be representative because it changed boundaries this year. Eugene, Salem and Lake Oswego, the districts having the next highest number of requests per pupil, have positive attitudes and/or flexible policies toward transfers.

Further study also would seem to be warranted concerning the relationship of other variables to the frequency of transfer requests and the reasons for those requests: (1) the degree of clarity of district attendance boundary lines; (2) the placement of attendance boundary lines (i.e., making an area on one side of a river part of a district on the other side of the river, when there is a more easily accessable school on the same side); (3) the degree of differentiation <u>between</u> schools in specific school districts; (4) the degree of differentiation <u>within</u> schools in specific school districts; (5) the amount of information (particularly via the media) that has been made available about individual schools; (6) the heterogeneity/homogeneity (in terms of socio-economic status, race, ethnicity, etc.) of each district's population.

TABLE 1

DISTRICT	NO. OF STUDENTS	NO. OF SCHOOLS	ESTIMATED NO. OF TRANSFER REQUESTS	ESTIMATED NO. OF TRANS, GRANTED
Albany	3,807	5	10	2
Beaverton	18,739	34	NA[1]	85
Corvallis	7,739	20	NA[1]	28
Eugene	21,156	44	278	266
Gresham	4,495	3	NA[1]	115[2]
Klamath Falls	7,114	22	11	11
Lake Oswego	6,265	11	72	66
North Clackamas	14,000	27	32	25
Portland	72,118	118	1647	1192
Salem	22,543	44	200	170
Springfield	9,821	20	190	29

[1]Figures on requested transfers were not available from these districts because initial requests go to the principals of the schools rather than to the central administration.

[2]This figure includes transfers from one room to another within the same school and re-admissions after withdrawal, or suspension as well as intra-district transfers.

TABLE 2

DISTRICT	NO. OF STUDENTS PER TRANSFER	NO. OF TRANSFERS PER SCHOOL	% OF TRANSFER REQUESTS GRANTED
Albany	1,903.2	0.4	20
Beaverton	220.4	2.5	--
Corvallis	276.4	1.4	--
Eugene	79.5	6.0	90
Gresham	39.0	38.3[1]	--
Klamath Falls	646.7	0.5	100
Lake Oswego	94.9	6.0	90
North Clackamas	560.0	0.9	80
Portland	60.5	11.4	75
Salem	132.0	3.6	85
Springfield	338.6	1.4	20

[1]These figures were arrived at using 115 as the number of transfers granted. See footnote 2 on Table 1.

Summaries of Policies

The following section contains more detailed summaries of each district's policy. Numbers of requested and granted transfers reported are in many cases estimates only.

Albany - 3,807 students; 5 schools; 10 transfers requested; 2 transfers granted

Albany District 8J has no written, or officially adopted transfer policy. To deal with the few transfer requests they get each year, the administration operates under the idea that transfers will not be granted unless a special request is made by an outside agency such as a doctor, judge, etc.

Beaverton - 18,379 students; 34 schools; 85 transfers granted

Beaverton District 48 has a formal, written student transfer policy. The policy first outlines the procedure a parent and student should follow in requesting a transfer. This entails acquiring forms from the instruction office, filling them out and delivering them to the principal of the attended school. After the request is reviewed by the principals of the schools involved, it is passed to the director with the recommendations of the two principals.[4]

The next section of the policy sets out four considerations by which a request should be judged. They are: a) educational need; b) teacher-pupil ratio in the receiving school; c) change in attendance boundaries requiring a change in school; and d) the date of application.

The attitude as a whole toward transfers may be summarized by a sentence

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[4]It is interesting to note here that in only two other districts (Gresham, and Corvallis) does the policy require recommendations by the involved school principals.

from Beaverton's policy statement: "Transfers within the district by students to a school outside their attendance area shall be minimized."

Corvallis - 7,793 students; 20 schools; 28 transfers granted

Corvallis District 509J has no officially adopted transfer policy. The feeling of the administration is that transfers should only be granted in hardship cases. Mr. Hardman, Director of Personnel, defined hardship cases as psychological problems (must be documented by a doctor's letter), discipline problems, or educational problems. Principals of the involved schools are responsible for ruling on the transfer requests.[5]

Eugene - 21,156 students; 44 schools; 278 requested transfers; 266 granted

Eugene District 4J has a formally adopted, written policy. The policy allows for considerable administrative discretion in granting transfers. It states that students will attend the school located in the attendance area in which they reside unless the superintendent upon presentation of good and sufficient reasons allows them to transfer. Two categories are given which shall constitute good and sufficient reason. They are the health of the child and hardship of the parents.

Administrative attitudes toward transfers are generally supportive.

Gresham - 4,495 students; 3 high schools; requested NA; granted less than 115

Gresham Union High School District 2J is the only district whose policy is not centrally administered. Their official policy requires the principals of the involved schools to decide whether or not a transfer is granted. Their

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[5]All information about Corvallis was obtained in a telephone conversation with Mr. Ray Hardman on April 25, 1972.

decision however can be appealed to the Superintendent. The policy states transfers can only be granted when a student has exceptional needs as determined by the principals. Exceptional needs is interpreted as meaning emotional or physical needs as opposed to educational needs. Present administrative attitude toward transfers is "very negative."[6]

Klamath Falls[7] - 4,637 students; 10 schools; 11 transfers requested; 11 granted

The Klamath Falls districts have no official written policy. There are three factors in practice which they use to judge transfer requests: a) health; b) domestic relations problems; and c) to make an adjustment in class loads.

Lake Oswego - 6,265 students; 10 schools; 72 transfers requested; 66 granted

The Lake Oswego district has a policy which gives all acceptable reasons for transferring. They include cases in which: a) a student moves from one attendance area to another during the school year and is allowed to finish that year in his old school; b) cases in which a student anticipates moving into a new attendance area after the beginning of a semester and wishes to enroll in the school for the attendance area into which he will be moving; c) cases in which a student has completed two years in a particular high school and wishes to complete his final year there even though he has moved

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[6]Telephone conversation with Mr. Bob Yeager, Research Analyst, April 6, 1972

[7]This includes both the Klamath Falls School District 1 and the Klamath Falls Union High School District 2, as they are administered by the same person from the same office. The data which we received was for both districts combined.

from that attendance area; and finally, d) a discretionary category which provides for transfers in cases where the educational interests or physical or emotional considerations indicate a transfer would be warranted. This last category is at the discretion of the superintendent. The attitude of the administration toward transfers is favorable, as long as class loads are not upset.

North Clackamas - 14,000 students; 27 schools; 32 requested; 25 granted

The transfer policy of North Clackamas District 12 will be reviewed by Dr. Dick Sonnen, Director of Pupil Personnel, after July 1, 1972. As it is now written, there are three reasons considered valid for granting transfe. a) if continued attendance at the present school is considered undesirable by the administration; b) if a family or student hardship exists; c) if a family moves from the attendance area during a student's eighth, eleventh, or twelfth year, or during the final nine weeks of the school year.

Portland - 72,118 students; 118 schools; 1647 transfers requested; 1192 granted

The opening paragraph of the official policy on attendance areas and transfers is significant in demonstrating the Portland Public Schools' attitude toward transfers. It says,

> In order to assure the best educational opportunities for all students, efforts should be made to encourage students to transfer on a voluntary basis to and from schools in a manner which will increase the heterogeneity of student populations according to racial, ethnic, social and economic factors in each school.

This statement reflects the uniqueness of the Portland district. Portland, being the only urban area in the state with a sizeable minority population, has to actively seek a racial balance within its schools. Ideal

balance is considered to be 10-25% Black.[8] One method of achieving this balance is the administrative transfer:

Each year Black students are sought out by district psychologists, counselors, and social workers, counseling in neighborhoods in which Blacks live. Black students are often asked to transfer to a school outside their attendance areas: from majority-Black schools to majority-Anglo schools. In transfers of this type, the school district provides transportation for the student to his or her new school.

There are two other types of transfer established by district policy, "Requested Transfers" and "Hardship Transfers." "Requested Transfers" is a catch-all category for which the only conditions are space available and racial balance. "Hardship Transfers" refer to students who may have some special need (i.e., health problems, special curriculum, transportation, proximity to job, etc.).

The Portland Public Schools do have administrative procedures which allow for concurrent, or as they term it, "co-operative" enrollment in two schools. This policy allows students to take advantage of courses offered in other schools, while remaining primarily in their original school. Transportation is not provided.

It should also be noted that several schools in the Portland district are district-wide in nature, or are open to other parts of the district. Most of these schools are at the pre-school, or high school level.

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[8] Interview with Dr. Edwin Schneider, Superintendent's Associate, April 4, 19

Salem - 22,543 students; 44 schools; 200 transfers requested; 170 granted

Salem District 24J has a written policy which states all acceptable reasons for transferring. However, this policy is several years old and the administration has chosen to disregard the rigid approach/ the policy takes toward transfers. All that is required now is a written request from a parent giving a valid reason for the change. "Valid reason" is interpreted as "any reason not considered by the school administration or the central administration to be a 'minor beef' with a teacher or another student."[9]

The attitude toward transfers is favorable. Superintendent Schmidt indicated the district has discussed the possibility of open enrollment for future consideration.[10]

Springfield - 9,821 students; 20 schools; 190 transfers requested; 29 granted

Springfield has just changed attendance boundaries this year. This change has resulted in a change in written and enacted transfer policy in order to treat the increased number of transfer requests with some consistency. In the past, transfer requests were handled not by the central administration, but by the principals of the schools involved. Each requests is now acted upon by a committee of four administrators (two assistant superintendents and two supervisory personnel). The committee has a list of guidelines setting forth acceptable reasons for transferring. Most of the guidelines deal with reasons for allowing a student to complete the year or grading period in his old school. A senior in high school whose parents move from the attendance area after the beginning of the school year may complete the year in his old

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[9]Telephone conversation with Dr. Charles Schmidt, May 23, 1972.

[10]Letter from Dr. Charles Schmidt, April 7, 1972.

school. Any student whose family moves after the first third of any grading period may be permitted to remain throughout the grading period, etc. One, however, mentions transfers to correct "an educational problem." In such cases, the member of the committee to whom the request is submitted is responsible for determining the facts of the case from the teacher(s) and school involved, in order to aid the committee in making its decision in the case. Parents are allowed to be present at the committee meetings. The procedure to gain a hearing before the committee is also spelled out. The parent and student fill out a Petition for Change of School Assignment and leave it with the building administrator.

The attitude toward transfers is negative.